Communications Survey

Listening to Canadians
Fall 2000

Canada Information Office
Bureau d'information du Canada

Canada

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Introduction

- The public opinion research undertaken by the Canada Information Office is part of its mandate to support the Ad Hoc Committee on Government Communications and to improve communications between the Government of Canada and its citizens.
- This research project continues to measure Canadians' views on public policy priorities and their assessment of the government's service to Canadians in responding to those priorities.
- The research also supports the government's service initiatives by exploring how Canadians currently access services from the government, how they obtain their information and their satisfaction with government services.
- The Fall 2000 survey also focusses on the impact of electronic communications in the context of the relationship between government and citizens. This research supports the Canada Information Office in contributing to the Government On-Line initiative, to make Canada the most electronically connected government in the world by 2004 by providing Canadians with electronic access to federal information and services.
- The research, all combined, is intended to give the reader a global view of the growing impact of e-communications on the Government-Citizen relationship.
- The results are drawn from our analysis of the most recent tracking survey on governmental communications, the seventh of our government communications surveys. It is based on a telephone survey by the Ipsos-Reid Group and GPC Communications of 4,700 adults across Canada between September 11 and 25, 2000.

The Survey (Wave VII)

- Total sample – 4, 700
- Margin of error for Canada: 1.5% (19 times out of 20)
- Oversampling in Nova Scotia, Manitoba, Saskatchewan, P.E.I., Newfoundland and New Brunswick

	Canada's population	Proportional representation	Actual number of interviews	Margin of error	Over-sampling (number of persons)
B.C.	12.1	613	450	4.7%	
Alta.	9.3	423	350	5.3%	
Sask.	3.6	164	320	5.6%	156
Man.	4.1	166	320	5.6%	154
Ont.	37.8	1 773	1 260	2.8%	
Que.	25.3	1 180	1 000	3.2%	
N.B.	2.6	153	400	5%	247
N.S.	3.0	153	400	5%	247
P.E.I.	0.4	37	100	10%	63
Nfld.	1.8	39	100	10%	61
(Atl.)	(7.8)	(382)	(1 000)	(3.2%)	

Social issues continued to dominate the public agenda -- much of it owing to concerns over health care. In contrast, economic issues were the top concern of only a minority of Canadians.

On the other hand, managing the economy continued to be a major communications strength for the Government. The Government again received good ratings on managing the economy as it did on the environment and the unemployment issue. Conversely, the Government received less positive ratings on health care, education and financial management of government. These latter issues represent the Government's most important communications challenges.

Most Canadians prefer to get their information from the Government through television, direct mail and newspapers but an increasing number prefer to receive it via the Internet. Health care, taxes and the environment stand out as the areas in which Canadians would most like to receive information from the Government.

Approximately half of Canadians contacted the Government for information or assistance during the three months previous to the survey. The majority of contacts were still made by telephone and large numbers of Canadians are aware of the 1-800 O Canada number. Satisfaction with service received has increased over the past two years. While a majority of Canadians were satisfied with the service that they received, whether they got it by telephone, in-person visits or by mail, satisfaction tended to be highest among persons who contacted the Government via the Internet.

The growth of Internet usage has been rapid although uneven across Canada's population: Internet access is much higher among young adults, high-income and university-educated Canadians and correspondingly lower among older Canadians and persons with lower incomes and less formal education. Important attitudinal barriers to Internet access among Canadians who are not "connected" include: lack of relevance of the Internet, perceived difficulty and security concerns.

Almost half of the Canadians who have Internet access have recently visited a Government web site. The Government's web sites are also rated very favourably across a range of factors, including: usefulness, adequacy and reliability of information and ease of access.

A review of studies done by federal departments on web sites suggests that the following factors would improve the usefulness of these sites to Canadians: (1) make access and use as easy as possible; (2) make information easy to find through search features and links; (3) make sites visually appealing and (4) ensure that sites are appropriate for the target audience.

Tracking Top-of-Mind Issues
(unprompted)

"Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most?"

Results for Fall 2000

Health care	- 29%
Education	- 10%
Taxes	- 8%
Debt	- 8%
Economy	- 7%
Jobs/Unemployment	- 5%
Poverty/Homelessness	- 5%
Environment/Pollution	- 3%
Crime/Violence	- 2%
Unity	- 2%
Social services	- 2%
Armed Forces/Military	- 1%
Canadian dollar	- 1%
Justice system (e.g. YOA)	- 1%
Free Trade	- 1%
Oil and gas prices	- 1%
Youth issues (e.g. child poverty)	- 1%

Social issues include:

Health care	- 29%
Education	- 10%
Poverty/Homelessness	- 5%
Environment/Pollution	- 3%
Crime/Violence	- 2%
Social services	- 2%

Economic issues include:

Taxes	- 8%
Debt	- 8%
Economy	- 7%
Jobs/Unemployment	- 5%

Tracking Top-of-Mind Issues

(unprompted)

- Social issues have overshadowed economic management as the public's priority since early 1999 (see preceding page). This is primarily because of the rise in concern over health care.
- The decline in mentions of of economic issues from 42% two years ago to 28% this Fall is due mostly to a drop in concern over unemployment.

Priority Issues (prompted)

"I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given higher priority by the Government of Canada."

	Atl. %	Que. %	Ont. %	Man. %	Sask. %	Alta. %	B.C. %	Canada
Health care	76	74	70	69	65	63	70	71
Education	67	62	62	62	58	61	60	62
Managing the economy	51	54	51	53	56	58	56	53
Cost-effectiveness	45	50	48	51	55	58	57	51
Crime and justice	41	55	46	45	48	55	48	49
Environment	44	42	49	41	36	41	42	45
Unemployment	52	53	42	41	41	37	43	45
Taxation	42	35	44	43	45	50	48	43
Canadian unity	32	28	32	33	33	25	30	30
Farm income	27	21	30	39	42	32	29	28
Representing Canada internationally	15	18	16	12	12	15	12	16

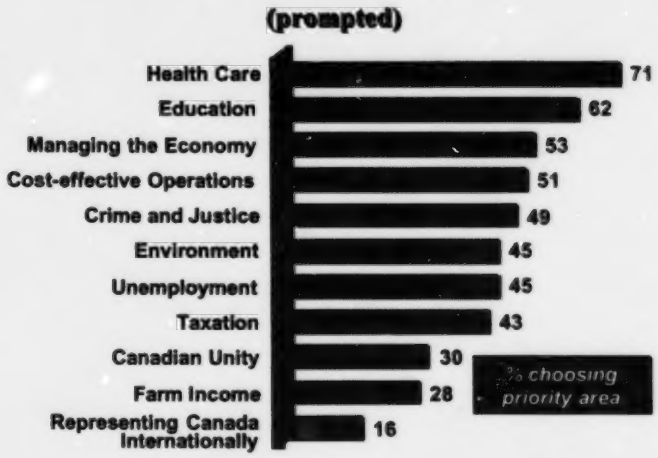
Note on Methodology: Respondents were asked which of two possible areas should be given the higher priority by the Government of Canada. Respondents were read 5 pairs of priority issues and asked to rank them. For example, respondents were asked which should be given higher priority by the Government of Canada: health care or taxation.

Health care, when offered as a choice against taxation, was chosen as a priority 76% of the time, compared to 23% who chose taxation.

The average score for health care was 71% when offered as a choice against all other issues.

The merit of this type of question is that it forces people to choose amongst competing priorities. Consequently, it forces them to prioritize issues and demonstrates the significance of each issue compared to others.

Priority Issues



- When Canadians were asked to choose the most important issues, social concerns dominate the agenda here as well. Health care remained at the top of the list, particularly in Atlantic Canada (see preceding page). Education also continued to register as a high priority for Canadians; it followed in second place.
- Fiscal issues formed a distinct second tier of priorities. Managing the economy was chosen by Canadians as the third-highest priority. There was also continuing concern over how the Government manages its programs, with cost-effectiveness chosen as a priority by 51%.
- Crime and justice ranked relatively higher than unemployment and the environment. The crime and justice issue was ranked particularly high in Quebec.
- The environment continued to be a mid-level priority at 45%, but scores more highly in Ontario at 49%. Unemployment was tied with the environment for sixth place. Unemployment continued to receive relatively higher priority in the Atlantic Region and Quebec.
- Farm income was chosen as a high priority by only 28% of Canadians, although it was rated relatively much higher in Manitoba and Saskatchewan (see preceding page).

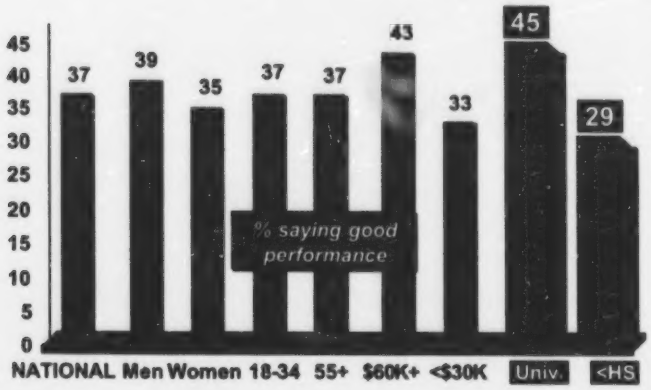
Overall Performance Rating

"Generally speaking, how would you rate the performance of the Government of Canada? Please use a 7-point scale where 1 is terrible, 7 is excellent and the midpoint 4 is neither good nor bad."

	Good (5,6,7) %	Neither (4) %	Terrible (1,2,3) %
GENDER			
Men	39	34	37
Women	35	28	36
AGE GROUP			
18 to 34	37	29	32
35 to 54	37	32	30
55 and over	37	34	29
INCOME			
less than $30K	33	37	30
$30K to $60K	36	34	30
$60K and over	43	30	26
EDUCATION			
Less than high school	29	37	34
High school	35	35	30
Other post-secondary	35	35	30
University	45	30	25
TOTAL	37	34	29

Overall Performance Rating

(by demographic group)



- The September survey found that 37% of Canadians gave the Government a good performance rating. While many polls with other measures of performance have been taken since then, it is important to note that in this survey the Government's performance ratings varied strongly according to income and education.
- For example, 45% of university graduates gave the Government a good rating, while only 29% of those with less than high school did. And while over four in ten (43%) higher-income earners gave a positive rating, only one in three (33%) of lower-income earners did so (see preceding page). Indeed, throughout the survey, we found significant differences between Canadians on the basis of income and education on both policy and communications issues.

Performance Ratings on Select Issues (prompted)

"How would you rate the Government of Canada's performance in each of the following areas?"

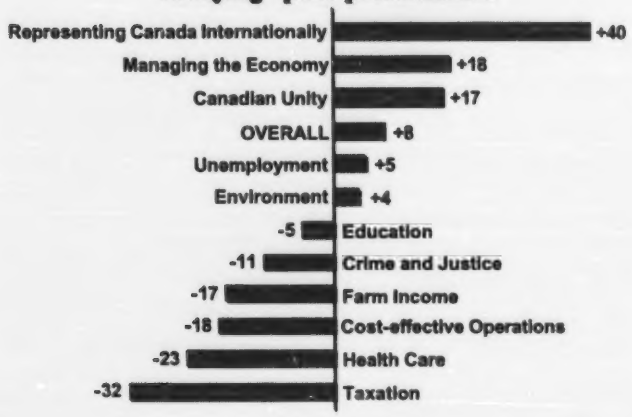
% saying good performance

	Spring 2000 (%)	Fall 2000 (%)	Change in %
Representing Canada Internationally	47	57	+10
Managing the Economy	49	46	-3
Canadian Unity	41	42	+1
Unemployment	41	37	-4
Environment	37	36	-1
Education	33	32	-1
Crime and Justice	33	31	-2
Health Care	30	27	-3
Cost-effective Operations	31	27	-4
Taxation	30	20	-10
Farm Income	20	17	-3

Note the improvement in the Government of Canada's performance rating with regard to representing Canada internationally (has increased 10 percentage points since Spring 2000). Note also the decline in the Government's performance rating on taxation (down 10 points), unemployment (down 4 points) and cost-effective operations (down 4 points).

Net Performance Rating on Select Issues

% saying "good performance" minus % saying "poor performance"



- In addition to rating the importance of various public policy issues, Canadians were also asked to rate the performance of the Government of Canada on these same issues.
- The above graph displays the net rating of the Government's performance on 11 issues, as well as the net rating for the Government's overall performance. This net rating is calculated by subtracting the proportion who give the Government a poor rating from those who give it a good rating.
- Of the 11 issues shown above, the Government received a positive rating on five and a negative rating on six. The strongest ratings were in the areas of representing Canada internationally, managing the economy, and Canadian unity. The weakest ratings were in the areas of taxation and health care.
- The overall trend from previous surveys is down slightly, more so in the case of economic issues and particularly taxation (see preceding page).

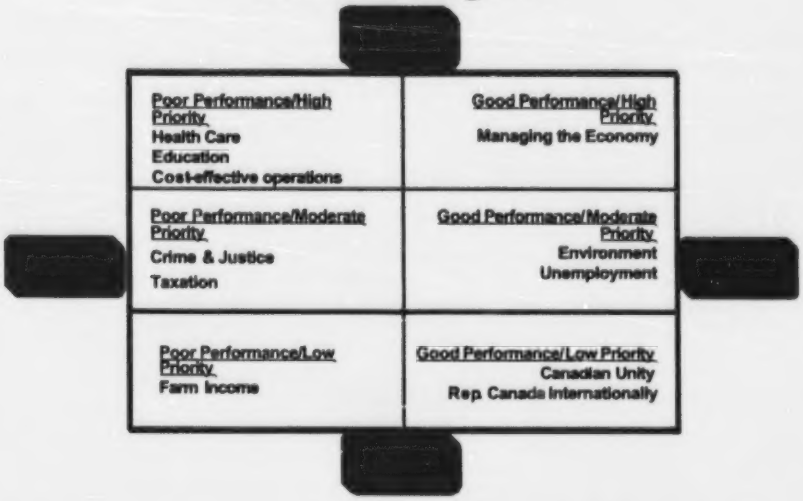
Communications Challenges and Strengths

Priority: "I am going to read you a list of two possible priority areas and I would like you to tell me which you think should be given higher priority by the Government of Canada".

Performance: "How would you rate the Government of Canada's performance in each of the following areas? Please use a 7-point scale where 1 is terrible, 7 is excellent and the midpoint 4 is neither good nor bad."

	% choosing priority area	% good performance (5,6,7)
Health Care	71	27
Education	62	32
Managing the Economy	53	46
Cost-effective Operations	51	27
Crime and Justice	49	31
Environment	45	36
Unemployment	45	37
Taxation	43	20
Canadian Unity	30	42
Farm Income	28	17
Representing Canada Internationally	16	57

Communications Challenges and Strengths



- The Communications Grid above suggests some of the most important communications strengths and weaknesses of the Government of Canada by juxtaposing the priority rating of each of the 11 issues discussed previously with the Government's performance rating on each. Challenges are located on the left-hand side of the grid; strengths on the right-hand side.
- The primary challenges for the Government of Canada are health care, education, and cost-effectiveness. These are high priority issues on which the Government receives net negative performance ratings.
- The Government's key strength is managing the economy. This is the only high priority issue on which the Government gets net positive performance ratings.

Communications Themes

"I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada."

% choosing theme

BY AGE

	18-34	35-54	55+
Strengthening health care system	61	64	62
Building a stronger Canada for our children	49	43	43
Improving Canadians' quality of life	43	41	40
Protecting the quality of environment	43	39	42
Building a dynamic economy	37	40	32
Building a safer, more secure Canada	37	33	35
Serving Canadians' with integrity	29	35	39

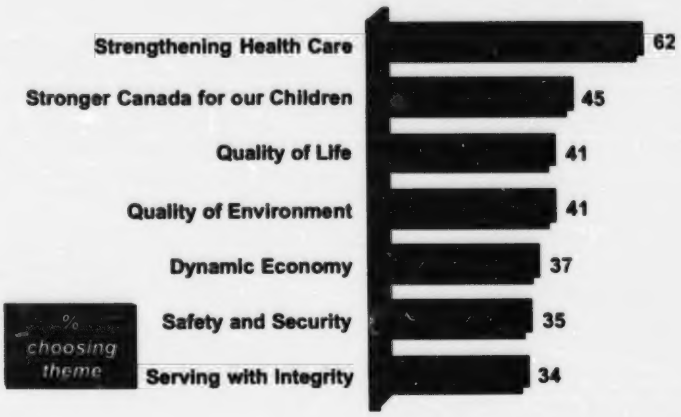
BY SEX

	Male	Female
Strengthening health care system	59	65
Building a stronger Canada for our children	46	44
Improving Canadians quality of life	40	42
Protecting the quality of environment	40	42
Building a dynamic economy	43	31
Building a safer, more secure Canada	32	38
Serving Canadians' with integrity	35	33

BY REGION

	B.C.	Alb.	Sask.	Man.	Ont.	Que.	Atl.
Strengthening health care system	63	55	57	61	61	66	68
Building a stronger Canada for our children	39	49	49	51	48	39	51
Improving Canadians' quality of life	41	41	37	38	39	46	42
Protecting the quality of environment	43	35	34	41	44	38	42
Building a dynamic economy	39	41	37	34	32	43	31
Building a safer, more secure Canada	34	38	37	40	37	31	33
Serving Canadians with integrity	37	36	38	30	33	36	28

Communications Themes



- Canadians were asked to choose the most important among a set of possible communications themes. *Strengthening health care,* chosen 62% of the time, again led the way among these themes. Other themes that emerged as relatively important are *stronger Canada for our children*, *quality of life*, and *quality of the environment.*
- Worth noting are a couple of interesting regional and demographic variations. The health care theme resonates most with Atlantic Canadians (68%), Quebecers (66%), and women (65%). *Building a stronger Canada for our children* was chosen more often in Manitoba (51%) and Atlantic Canada (51%). Conversely, the theme of a *dynamic economy* was of particular interest among men (43%) and Quebecers (43%). *Serving Canadians with integrity* was favoured by Canadians 55 and over (39%) (see preceding page).

- Response to question, *"Thinking about information provided to you by the Government of Canada about its policies, programs and services, would you say you receive too much, too little, or about the right amount of information?"*

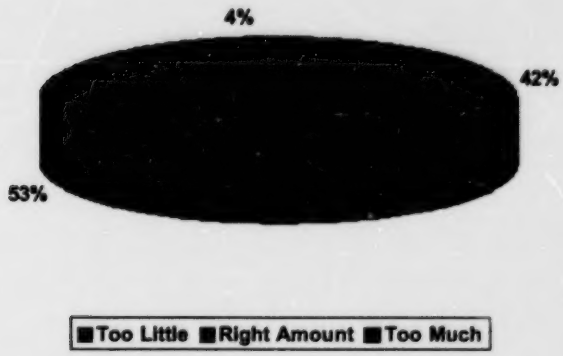
Response by Province

Province	Too Much %	Too Little %	About the Right Amount %
B.C.	6	41	52
Alberta	5	42	43
Saskatchewan	4	43	51
Manitoba	5	38	56
Ontario	4	43	51
Quebec	2	42	55
New Brunswick	3	44	53
Nova Scotia	4	49	47
P.E.I.	5	28	67
Newfoundland	4	45	51
Canada	4	42	53

Government's Overall Performance Rating: By Amount of Information Received from the Government

Too Much %	Too Little %	About the Right Amount %
29	31	43

Amount of Information Received by Canadians from the Government of Canada



- Canadians continue to have a strong desire for information from the Federal government as large numbers of Canadians believe that the Government gives them "too little" information. While a majority of Canadians (53%) believe that they get "the right amount" of information from the Government of Canada, an almost equally-large number (42%) are of the opinion that they get "too little" information. Relatively few (4%) consider the amount of information they get to be "too much". The need for government information is similarly high in every region of the country (see preceding page).

Impact of Information on the Government's Performance Rating

"Generally speaking, how would you rate the performance of the Government of Canada? Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point is neither good nor bad?"

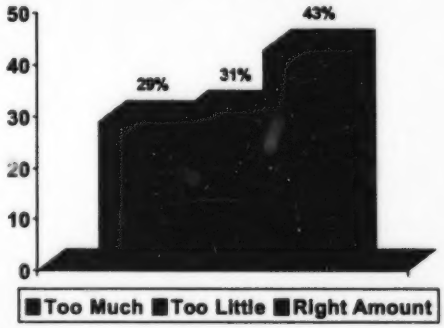
"Thinking about information provided to you by the Government of Canada about its policies, programs and services, would you say you receive too much, too little or about the right amount of information?"

Rating of Government's Performance	Too Much %	Too Little %	Right Amount %	Total, Canada %
Good (5, 6, 7)	29	31	43	37
Neither (4)	29	35	33	34
Poor (1, 2, 3)	42	33	25	29
Total	100	100	100	100

Impact of Information on the Government's Performance Rating

Rating of Overall Government Performance

Proportion Who Gave "Good" Performance Rating: by Amount of Information Received



- The information flow from government to the people appears to have a positive effect on Canadians' impressions of the Government of Canada. While the survey found that over one third of Canadians (37%) gave the Government a "good" overall performance rating, the Government's performance rating was higher (43% gave a good performance rating) among those Canadians who believe that they receive "the right amount" of information. Among those who believe that they get "too little" information, only 31% gave the Government a good rating (see preceding page).

Information Areas of Most Interest

"I am going to read you a series of two possible Government of Canada information areas and I would like you to tell me which one interests you more personally."

% choosing theme

BY AGE

	18-34	35-54	55+
Health care	57	62	72
Taxes	48	56	58
Environmental protection	38	41	54
Finding employment	46	38	31
Access to post-secondary education	42	36	29
Starting a small business	37	38	28
Government careers	31	25	15

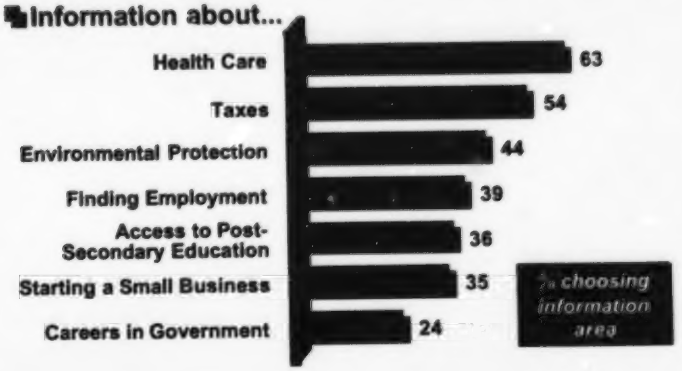
BY SEX

	Male	Female
Health care	59	67
Taxes	56	52
Environmental protection	44	44
Finding employment	38	39
Access to post-secondary education	36	37
Starting a small business	39	30
Government careers	24	25

BY REGION

	B.C.	Alb.	Sask.	Man.	Ont.	Que.	Atl.
Health care	64	64	60	66	63	63	64
Taxes	56	61	60	54	53	52	48
Environmental protection	42	36	42	40	51	39	41
Finding employment	35	37	35	38	36	45	43
Access to post-secondary education	40	39	34	43	37	31	39
Starting a small business	33	37	39	32	33	38	33
Government careers	23	23	25	22	23	27	27

Information Areas of Most Interest



- When asked to choose between a series of paired trade-offs regarding areas where Canadians might want to receive information, they expressed the most interest in health care and taxes.
- Other areas also present communications opportunities, namely the environment and employment.
- Ontarians (51%) and those aged 55 and over (54%) are particularly interested in receiving information on environmental protection (see preceding page).
- Quebecers (45%) and the 18-34 age group (46%) express the greatest degree of interest in information about finding employment.
- One in four (24%) were interested in information about careers in government. Interest in this topic was highest among young adults (31%).

Sources of Information

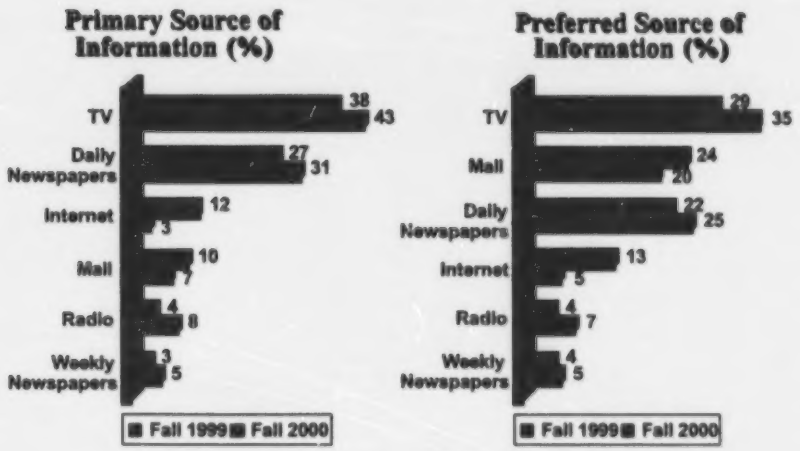
*"What would you say is the **primary** way by which you currently get information from the Government of Canada?"*

	Fall 1999 (%)	Fall 2000 (%)
TV	43	38
Daily newspapers	31	27
Internet	3	12
Mail	7	10
Radio	8	4
Weekly newspapers	5	3

*"And how would you **prefer** to receive information from the Government of Canada?"*

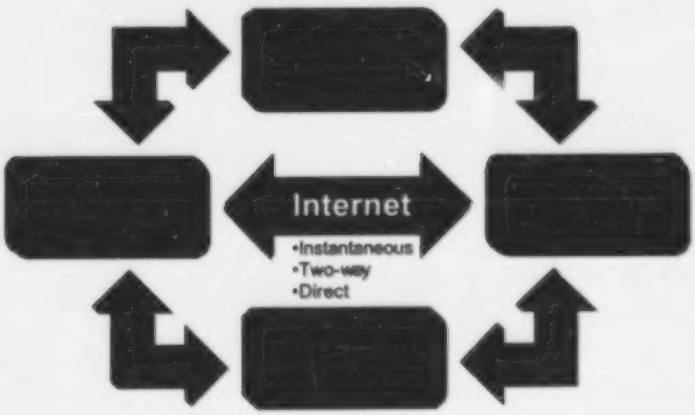
	Fall 1999 (%)	Fall 2000 (%)
TV	35	29
Daily newspapers	25	22
Internet	5	13
Mail	20	24
Radio	7	4
Weekly newspapers	5	4

Sources of Information



- The information flow from Government to the public takes place through a variety of media. Most Canadians continued to receive the largest amount of their information from the Government through television and newspapers.
- When asked how they would prefer to receive information, the largest numbers indicated they would most prefer to receive it through television, mail and daily newspapers. While only one in ten Canadians said that they currently receive the largest amount via the mail, one in four *would like* to receive information through this medium.
- The number whose primary source of information from the Government is through the Internet increased significantly from only 3% in Fall 1999 to 12% in Fall 2000. Similarly, the number of Canadians who *would like* to get most of their information through the Internet was up from 5% in Fall 1999 to 13% in Fall 2000 (see preceding page).

E-Communications: The New Relationship between Government and Citizens



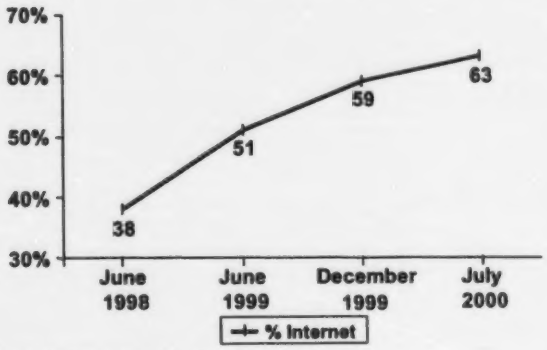
"By 2004, our goal is to be known around the world as the government most connected to its citizens"

Speech from the Throne, October 12, 1999

- The Fall 2000 survey examines the impact of e-communications, an emerging new relationship between Government and citizens based on the use of electronic technology. In addition to its many different effects on Canadian society and the economy, the Internet has provided Government and citizens with a rapid, direct and two-way channel of communication. This medium will complement and supplement traditional channels of information dissemination, such as television, newspapers and direct mail and traditional methods of service delivery, such as telephone, in-person contact and the mail.

Growth in Internet Usage

"In the past three months, have you used any of the following electronic or computer products and services, either at home or elsewhere...?"



Source: Rethinking the Information Highway, Ekos Research Associates Inc.

- The growth in the use of the Internet for obtaining information from the Government is a natural consequence of the widespread diffusion of the Internet in our society. The proportion of Canadians who have access to the Internet has increased rapidly since 1998. In July 2000, 63% of Canadians claimed to have Internet access versus only 38% two years previously. The trend in the growth line (above) also suggests that growth has been slowing, which may portend greater resistance to Internet adoption among Canadians who do not now have access.

Internet Access: Canada

"Do you have access to the Internet?"

% Saying Yes

BY AGE

18-34	79
35-54	71
55+	38

BY SEX

Male	69
Female	61

BY REGION

B.C.	71
Alb.	70
Sask./Man.	58
Ont.	70
Que.	55
Atl.	62

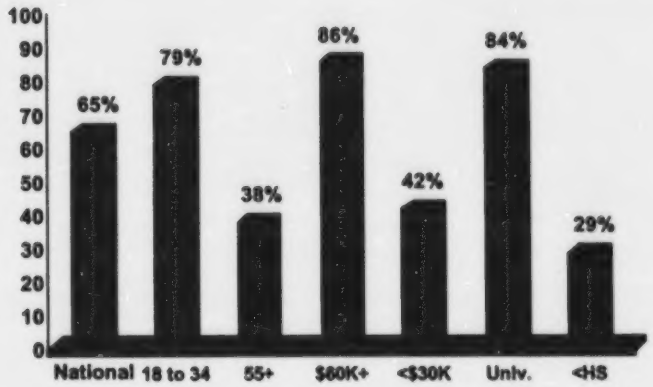
BY INCOME

Less than $30K	42
$30K - $59K	61
$60K +	86

BY EDUCATION

Less than high school	29
High school	55
Post-secondary	69
University	84

Internet Access



- In September 2000, almost two thirds (65%) of Canadians had Internet access. Adoption of this medium, however, has been very uneven across the Canadian population.
- Access was much higher among high-income earners, the university-educated and young adults (see preceding page). Conversely, access was much lower among low-income earners, persons with less than a high school education and older Canadians.
- Internet access was only slightly higher among men than among women.
- Internet access was highest in British Columbia, Alberta and Ontario and lowest in Quebec.

Recent Visit to Government of Canada Web Sites

"Have you visited any Government of Canada Web sites in the past three months?"

Among Canadians with Internet access - 44%

- Among Internet users those **most** likely to have visited a Government of Canada Web site are men (47%), university-educated (52%), and higher income (47%).
- Among Internet users those **least** likely to have visited a Government of Canada Web site are women (40%), older people (29%), Albertans (34%) and those with less than a high school education (25%).

"Which Government of Canada Web site do you visit most often?" (unprompted — follow-up question asked of those who had visited a Government of Canada Web site in the past 3 months).

HRDC	- 15%
CCRA	- 12%
Main Government of Canada Web site	- 6%
Health Canada	- 5%
Environment Canada	- 4%
Statistics Canada	- 4%
Department of Justice Canada	- 3%
Natural Resources Canada	- 3%
Student Aid program	- 3%
Citizenship and Immigration Canada	- 3%
Employment Insurance	- 2%
Department of National Defence	- 1%
Transportation	- 1%
Agriculture Canada	- 1%
Political party home pages	- 1%
Parliament Hill	- 1%
Public Service Commission	- 1%

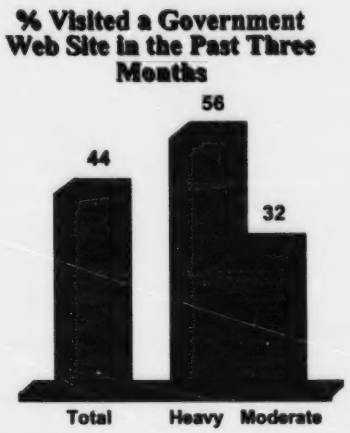
- Those most likely to have visited **HRDC** are under 34 (17%), female (18%) and from Atlantic Canada (21%).
- Those most likely to have visited **CCRA** are under 34 (12%), male (14%) and from BC (14%) or Alberta (14%).

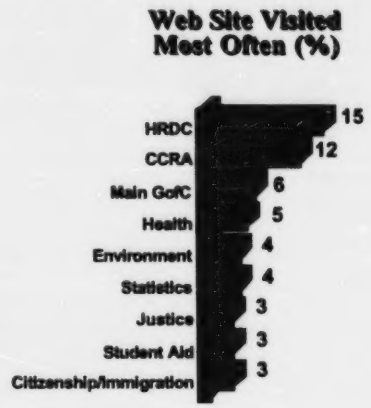
Respondents were also asked the following question:

"Have you ever visited the main Government of Canada Web site, also known as www.canada.gc.ca?"

Yes - 44% No - 53%

Recent Visit to Government of Canada Web Sites





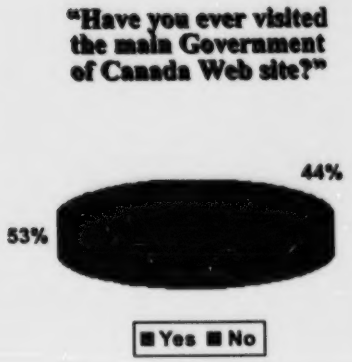
- Over four in ten (44%) Canadians who had Internet access visited a Government of Canada Web site during the three months before the survey was taken. A very large proportion (56%) of heavy Internet users visited Government of Canada Web sites during this period. By contrast, only one in three "moderate" Internet users (defined as persons who used the Internet less than five hours a week) visited government sites.
- The most commonly visited site was the Human Resources Development Canada site, visited by 14% (see preceding page); it was particularly popular among women (18%) and young adults (17%). The Canada Customs and Revenue Agency site, visited by 11%, tended to have a clientele with higher incomes.
- Other popular sites included Health Canada and the main Government of Canada Web site, which saw a three-point increase in usage since last Spring.

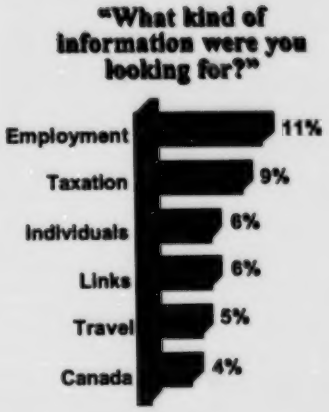
Visit to Main Government of Canada Web Site

Response to question, *"What kind of information were you looking for?"*

Topic	%
Employment	11
Taxation	9
MPs/Government employees	6
Links to other Departments	6
Travel/tourism/passports	5
General Information/Canada	4
Business Information	4
Education	3
Health care	3
Social programs	3
Historical	2
Gun control/firearms	2
Exports/Imports/Customs	2
Pensions	2
Immigration/citizenship	2
Grants	2
Legislation	2
Justice	2
Research (unspecified)	2
Government expenditures	2
Statistics	2
Programs/policies (general)	1
Other	19
Don't know	7

Visit to Main Government of Canada Web Site





- Almost half (44%) of Canadians who visited a Government web site went through the main Government of Canada web site.
- Visits to the main Government of Canada site were much more frequent by heavy Internet users (50%) than by moderate users (33%).
- Reasons for visiting this web site were very diverse, ranging from job searches to travel information to general information about Canada (see preceding page).

Ratings for Government of Canada's Web Sites

"How would you rate Government of Canada Web sites across each of the following aspects?" Please use a 7-point scale, with 1 being very poor and 7 being very good."

% saying good

BY AGE

	18-34	35-54	55+
Reliability of information	82	77	75
Ease of access	79	76	66
Usefulness of the information	75	74	69
Ease of use	76	74	60
Adequacy of information	76	71	65
Overall look	74	71	61

BY EDUCATION

	Less than high school	High school	Post-secondary	University
Reliability of information	80	73	77	82
Ease of access	74	73	76	77
Usefulness of the information	58	67	75	77
Ease of use	76	73	74	72
Adequacy of information	67	69	75	72
Overall look	66	65	73	72

BY INCOME

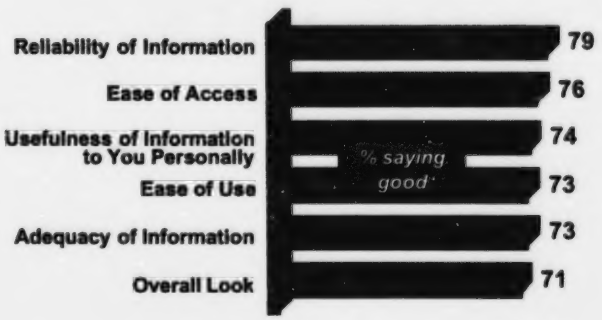
	Less than $30K	$30K - $59K	$60K+
Reliability of information	79	80	80
Ease of access	78	76	77
Usefulness of the information	73	73	76
Ease of use	73	76	73
Adequacy of information	74	73	72
Overall look	65	74	72

BY REGION

	B.C.	Alb.	Sask.	Man.	Ont.	Que.	Atl.
Reliability of information	77	75	87	81	77	84	75
Ease of access	73	76	77	81	73	82	84
Usefulness of the information	70	75	70	72	73	78	74
Ease of use	73	71	82	80	70	78	77
Adequacy of information	70	66	72	69	71	80	75

Ratings for Government of Canada Web Sites

"How would you rate Government of Canada Web sites across each of the following aspects?"



- Government of Canada Web sites were rated very positively by those Canadians who have visited them.
- Government of Canada Web sites received uniformly high marks in every category: reliability, ease of access, usefulness of information, ease of use, adequacy of information and overall look (see preceding page).
- The Web sites were rated very highly by Canadians in every region and among every demographic group.

Internet User Profile

"On average, how many hours per week do you use the Internet?"

	Heavy user (5 or more hours per week) %	Moderate user (less than 5 hours per week) %	Non-user %
AGE			
18-34	56	38	3
35-54	45	46	7
55+	40	45	13
INCOME			
Less than $30K	50	41	8
$30 K - $59K	48	42	8
$60K +	50	43	5
EDUCATION			
Less than high school	49	37	11
High school	43	44	10
Post-secondary	50	42	5
University	51	44	5
SEX			
Male	52	42	5
Female	45	44	8
REGION			
B.C.	48	44	5
Alb.	44	47	7
Sask./Man.	40	46	11
Ont.	51	42	6
Que.	50	42	5
Atl.	49	41	9

Now please tell me whether you agree or disagree with the following statements.

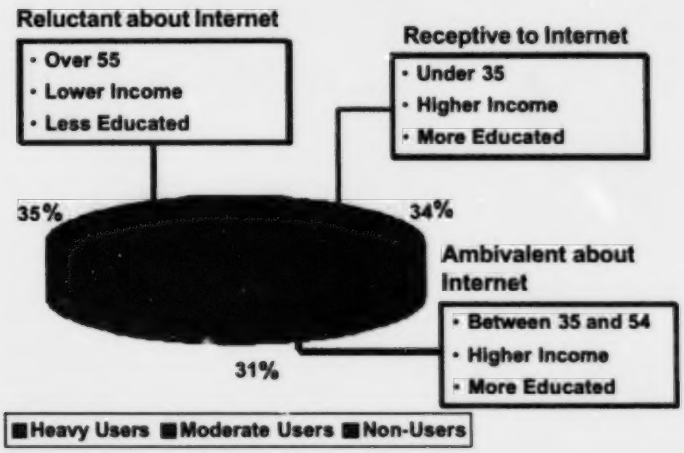
1) In the next 5 years, I think most of my dealings with government will be conducted over the Internet (example of receptive attitude among heavy users).

   Heavy users - 54% Moderate users - 34% Non-users - 23%

2) Material on the Internet should be regulated (example of ambivalence among moderate users).

   Heavy users - 45% Moderate users - 59% Non-users - 53%

Internet User Profile



Internet User Profiles

- This analysis found that the number of hours spent on the Internet is a good indicator of a person's Internet usage in many ways. This analysis will therefore use the number of Internet hours per week as a basis and the following groups will be compared: heavy users, who are on-line five hours or more a week; moderate users, who are on-line less than five hours per week; non-users, who have no Internet access.
- Heavy users tend to be young, university-educated and affluent. They believe that most of their dealings with the Government will soon be over the Internet (see preceding page).
- Moderate users are concentrated in the 35 to 54 age group. They are more ambivalent about electronic communications.
- The non-users tend to be older, have lower incomes and have less formal education.

Non-Users, Who Intend to Access Internet

Response to question, *"How likely are you to use the Internet in the next 12 months? Are you very likely, somewhat likely, not very likely or not at all likely?"*

RESPONSE BY AGE GROUP

Age Group	Very/somewhat likely %	Not very/not at all likely %
18 to 34	51	49
35 to 54	39	61
55 and over	13	87
Canada	29	71

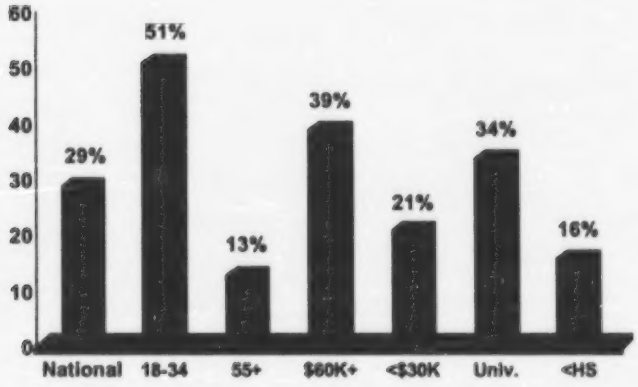
RESPONSE BY EDUCATIONAL ATTAINMENT

Educational Attainment	Very/somewhat likely %	Not very/not at all likely %
Less than high school	16	83
High school completed	28	71
Other post-secondary	36	64
University	34	64
Canada	29	71

RESPONSE BY INCOME

Income	Very/somewhat likely %	Not very/not at all likely %
Less than $30K	21	79
$30K to $60K	35	65
$60K and over	39	61
Canada	29	71

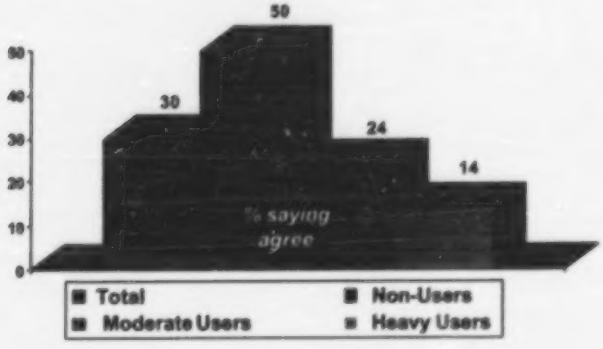
Non-Users, Who Intend to Access Internet



- Among the millions of Canadians who still do not have Internet access, a significant proportion (29%) indicated that they intended to acquire Internet access over the next 12 months. This is especially true of young adults, high-income earners and university graduates (see preceding page).
- Intended adoption of the Internet tended to be lower among the segments of Canadian society that have had the least Internet penetration to date: older Canadians, low-income earners and persons with less than high school education. For example, only one in eight Canadians (13%) over 55 said that they were going to obtain Internet access during the next 12 months; this suggests that approximately seven eighths of Canadians over 55 who did not have access in September 2000 would still not have access by September 2001.
- What are the attitudinal barriers to Internet adoption?

Barriers to Internet Use: Personal Relevance

"Some people may benefit from having access to the Internet but it won't be me."

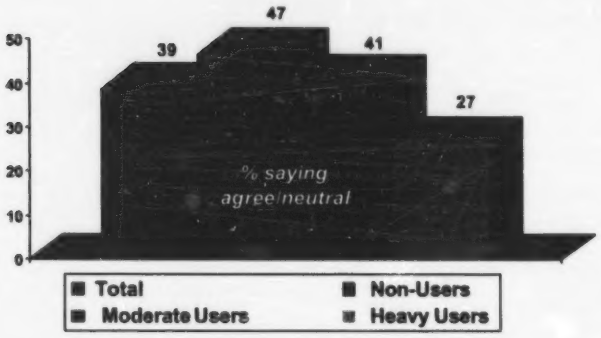


Many Do Not See the Internet Offering Any Benefits

- First, half (50%) of non-users believe that having access to the Internet will not benefit them personally. This view is not restricted to non-users: one in four moderate users (24%) and even some heavier users (14%) do not believe that access to the Internet will benefit them.

Barriers to Internet Use: Complexity

"The Internet is difficult to use."



The Internet is Perceived by Many to be "Difficult"

- A second barrier is the perceived difficulty of using the Internet. Again, almost half of non-users (47%) believe the Internet is difficult to use. However, almost as many moderate users (41%) and even many heavy users (27%) do not consider the Internet to be user-friendly.

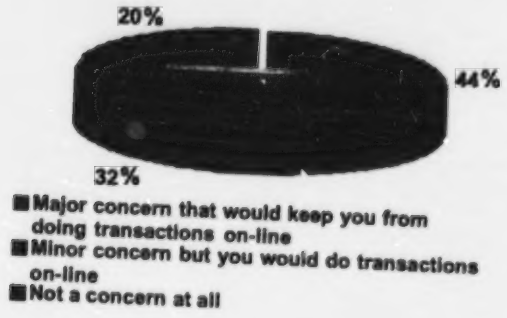
Barriers to Internet Use: Security of On-Line Transactions

"Thinking about Government Web sites, how concerned are you with the security of transactions you might make?"

	% who are concerned about the security of on-line transactions
AGE	
18-34	37
35-54	48
55+	46
INCOME	
Less than $30K	43
$30K - $59K	47
$60K +	38
EDUCATION	
Less than high school	44
High school	48
Post-secondary	45
University	39
SEX	
Male	39
Female	48
REGION	
B.C.	47
Alb.	46
Sask.	42
Man.	45
Ont.	42
Que.	45
Atl.	45

Barriers to Internet Use: Security of On-Line Transactions

"Thinking about Government Web sites, how concerned are you with the security of transactions you might make?"


20%
44%
32%
Major concern that would keep you from doing transactions on-line
Minor concern but you would do transactions on-line
Not a concern at all

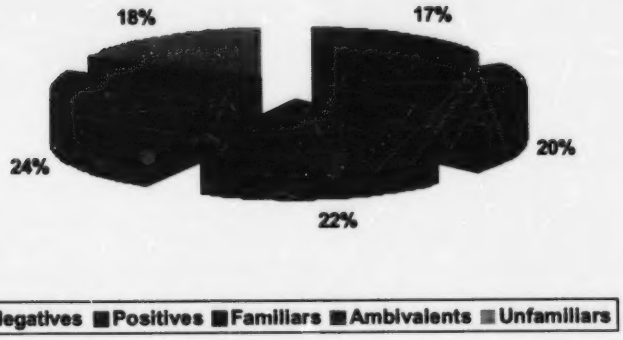
Security is a Major Concern

- Third, from a transactional point of view, security concerns are an important factor in the reluctance to go on-line. A large number of Canadians (44%) say this concern would keep them from doing transactions over the Internet. This is especially strong among women and persons 35 and over (see preceding page).

The Five Segments of Opinion: % in Agreement with Statements About the Internet and Government Web Sites

% Strongly Agree (8,9,10)	[illegible]	[illegible]	[illegible]	[illegible]	Ambivalents
Someday, having a computer and access to the Internet will be as commonplace as having a telephone is today	70	88	96	54	78
Web sites are a good way for governments to provide information on their programs to the public	31	56	81	14	42
Having access to the Internet will improve a person's employment prospects	32	64	78	19	33
In the next five years I think the majority of my dealings with government will be conducted over the Internet	11	35	63	1	15
Overall, Government of Canada web sites are as good as most of the private sector web sites I have visited	17	35	43	10	20
Some people may benefit from having access to the Internet but it won't be me	17	57	1	60	1
I think more people would use the Internet if they had more time	25	54	47	13	27
The Internet definitely improves people's quality of life	8	32	42	2	8
People who don't use the Internet are getting left behind	17	44	56	11	14
Material on the Internet should not be regulated	61	11	32	3	
The Internet is difficult to use	9	28	3	21	3
I think most people don't really like the Internet but need it for their job	11	40	7	15	5

The Five Segments of Opinion



Source: Ipsos-Reid Group/GPC Communications

- As Canadians' needs and use of the Internet vary widely, the Government's communications may be enhanced by identifying segments of the population depending on the characteristics of these segments. Based on an analysis of 12 attitude statements, Ipsos-Reid/GPC was able to group Canadians into five distinct groups based on their attitudes toward the Internet. These groups are the following.
- **The Unfamiliars (18% of the population)** Canadians in this segment are the most fearful of and cynical toward the Internet. Only 36% of this segment has Internet access and over two thirds (70%) of these are moderate users. They are least likely to believe that the Internet will benefit them. They are also the least likely to believe that the majority of their dealings with the Government will be through the Internet. Members of this segment tend to be older, have lower incomes and are less likely to have university education. Communications with this group need to both change attitudes towards and increase familiarity with the Internet.

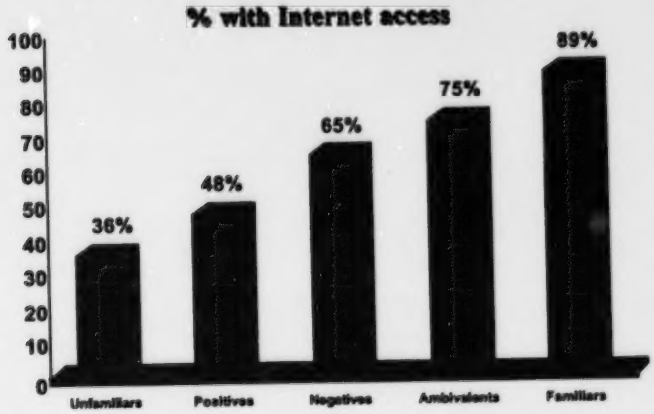
The Five Segments Of Opinion: Level of Internet Use

Internet Use	Negatives %	Positives %	Familiars %	Unfamiliars %	Ambivalents %
Heavy	33	20	60	11	35
Moderate	32	28	29	25	40
Non-User	35	52	11	64	25
Total	100	100	100	100	100

The Five Segments Of Opinion: Intended Adoption of the Internet

Likelihood of Adopting	Negatives %	Positives %	Familiars %	Unfamiliars %	Ambivalents %
Very/ somewhat	34	25	58	14	43
Not very/ Not at all	66	75	42	86	57
Total	100	100	100	100	100

The Five Segments of Opinion: Level of Internet Use



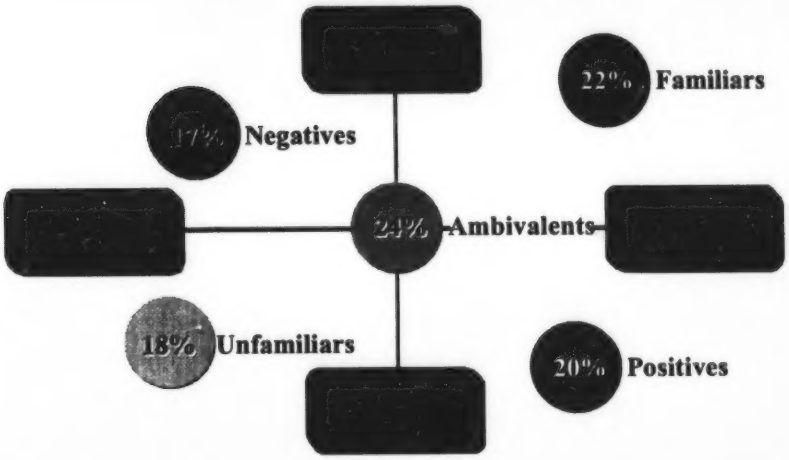
- **The Positives (20% of the population)** While Canadians in this segment tend to have much more positive attitudes toward the Internet, the Positives tend to have relatively low familiarity with the Internet. Only 48% of the Positives have Internet access and the majority of these are moderate users (58%). Positives also tend to be older, have lower incomes and have less formal education. Communications to this group should focus on providing information rather than changing attitudes.

- **The Negatives (17%)** tend to hold negative attitudes toward the Internet and government web sites in general. They are the most likely to oppose government regulation of the Internet. Despite their negative attitudes, they tend to be more familiar than most with the Internet. 65% of this segment has Internet access, and are evenly divided between moderate (49%) and heavy (51%) users of the Internet. Communications with this segment should focus on encouraging use of Government web sites.

The Five Segments Of Opinion: Demographics

	Negatives %	Positives %	Familiars %	Unfamiliars %	Ambivalents%
"What age group do you fall into?"					
18-34	33	25	47	21	40
35-64	53	54	48	54	53
65+	15	21	5	26	7
"What is the highest level of formal education that you have completed?"					
Grade school/high school	38	50	21	47	28
Post-secondary & some university	37	32	39	33	38
Complete university degree	24	18	40	20	24
"And, finally, which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes."					
<$30k	29	35	17	34	21
$30-59k	38	37	33	43	36
$60k+	33	28	50	23	43
REGION					
B.C.	13	12	13	13	15
Alb.	10	8	11	8	8
Sask./Man.	8	7	6	9	7
Ont.	38	34	44	34	38
Que.	25	31	18	27	25
Atl.	7	9	8	9	7
GENDER					
Male	63	44	55	41	44
Female	38	56	45	59	57

Segmentation Based on Attitudes Towards the Internet and Government Web site



- **The Ambivalents (24%)** The Ambivalents tend to hold moderate attitudes towards the Internet and government Web sites. They tend to have higher incomes and more formal education and tend to be younger. Three quarters (75%) of this segment has Internet access. This group is almost evenly divided between moderate and heavy Internet users.
- **The Familiars (22% of the population)** This segment is both very positive about the Internet and is also the most familiar. They are favourable toward the Internet in almost every way and are mostly heavy Internet users (67%). This group tends to be young, affluent and well-educated and has relatively low need either for basic information on the Internet or for inducements to use government Web sites. Government on-line communications will clearly be most successful with the Familiars.

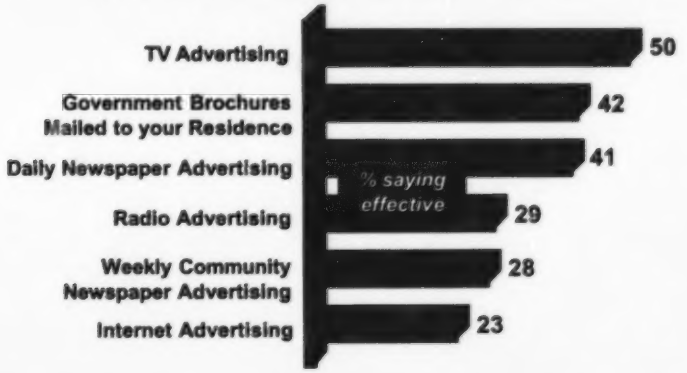
Addressing the Challenges: Relevant, Easy-to-Use Web Sites

- Convenient, user-friendly format
- Greater use of links
- Visually appealing
- Targeted
- Secure

- On the other hand, many Canadians will be using the Internet for the first time during the next 12 months. What are the factors that will make government Web sites more attractive to these new users?
- A review of 30 studies done by Government of Canada departments suggests that as sources of information, government Web sites get high marks. But the lessons learned from these studies include the following:
  - make access and use of sites as easy as possible;
  - make information easy to find through search features and links;
  - make sites visually appealing; and
  - ensure that the site is appropriate for the target audience.
- Some of the studies also show that security is a major concern when Canadians are asked about on-line transactions.

Addressing the Challenges: Promotion of E-Communications

"If the Government of Canada wanted to make you more aware of its Website and the kind of services it offers online, how effective do you think each of the following would be?"



- Canadians (both users and non-users of the Internet) were asked which media would be the most effective for advertising government web sites. Television was rated as the most effective medium for Web site advertising, followed closely by direct mail and daily newspapers. Among the total population (including both users and non-users), Internet advertising was the least preferred method.
- Television was rated highest by both Canadians with incomes below $30,000 (52% effective) and Canadians with less than high school education (48% effective). Older Canadians gave equally high ratings to television (39% effective) and newspapers (38% effective).
- Internet advertising is considered to be effective more often by heavy internet users (32%) than by moderate users (18%) or non-users (19%).

Salient Issues by Internet Usage

"I am going to read you two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada."

	Moderate < 5 hrs. %	Heavy 5+hrs. %	Non-Users %
Taxation	44	46	39
Unemployment	43	47	46
Education	62	66	59
Managing the Economy	55	54	51
Environment	47	44	44
Canadian Unity	29	29	32
Crime and Justice	47	49	52
Health Care	73	68	71
Farm Income	27	26	32
Representing Canada Internationally	16	17	15
Managing its Operations in a Cost-Effective Way	52	51	49

Salient Issues by Internet Usage

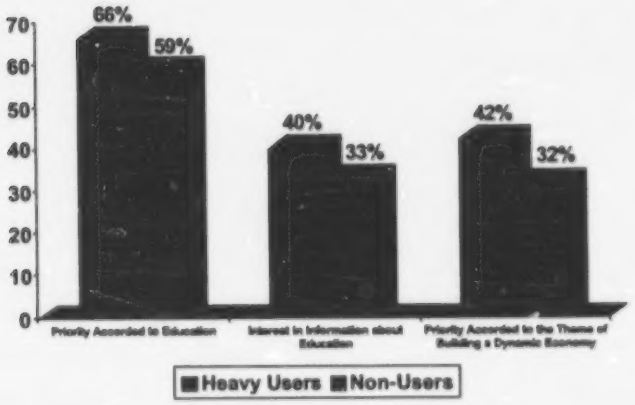
"Now I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada."

INTERNET USERS

	Moderate <5 hrs. %	Heavy 5+ hrs. %	Non-Users %
Building a Stronger Canada for our Children	44	46	46
Improving Canadian's Quality of Life	39	42	42
Serving Canadians with Integrity	35	33	34
Building a Safer, More Secure Canada	34	34	37
Protecting the Quality of our Environment	44	40	40
Building a Dynamic Economy	37	42	32
Strengthening the Health Care System	63	61	63

Issues of Particular Salience to an Internet Audience

Education and Economy



- The chart above shows some issues that are likely to hold more salience for heavy Internet users in comparison with non-users.
- Tending to be younger, upper income, and have more education, the Internet audience is characterized by a comparatively greater level of concern with and higher degree of receptivity to information about education and the economy (see preceding page).
- This suggests that themes and messages related to education and the economy will resonate particularly well on the Internet, since the audience for this medium is more attuned to these issues than is the overall population.

Salient Issues by Internet Usage

"I am going to read you a series of two possible Government of Canada information areas and I would like you to tell me which one interests you more personally."

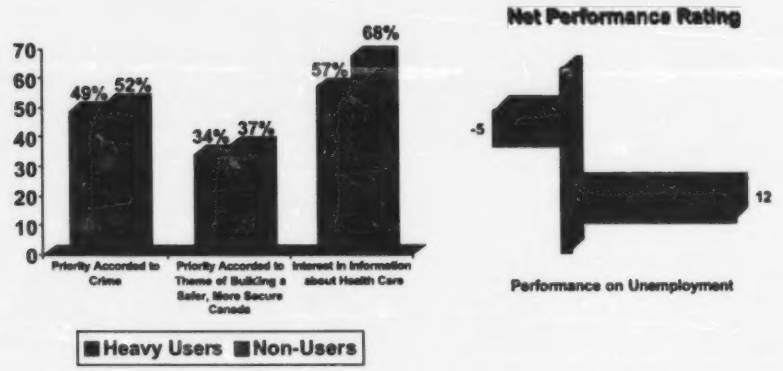
INTERNET USERS

	<5 hrs. %	5+ hrs. %	Non-Users %
Information about Health Care	63	57	68
Information about Access to Post-Secondary Education	37	40	43
Information about Taxes	55	54	53
Information about Environmental Protection	45	40	46
Information about Help to Start a Small Business	36	37	32
Information about Help to Find Employment	37	40	39
Information about Careers in the Government of Canada	24	28	21

PERFORMANCE RATING ON UNEMPLOYMENT

	% saying good performance	% saying poor performance	Net performance rating
<5 hrs.	39	30	+9
5+ hrs.	41	29	+12
Non-Users	32	37	-5

Issues of Particular Salience to a Non-Internet Audience
Crime, Health Care, Unemployment



- Equally important is identifying the issues that are of particular salience to non-users of the Internet.
- As depicted in the above chart, crime, health care, and unemployment are the issues which set the non-Internet population apart from the avid Internet population. These are the areas that non-users either accord higher priority to, express interest in receiving information about, or on which they assess the Government's performance negatively. That they emerge as the issues which are more relevant to non-users is consistent with the demographic profile of the non-user: older, less-educated, and lower-income. Past research by the CIO has shown that these demographic groups have a higher-than-average concern with the aforementioned issues.
- To reach the population segments that are most interested in crime, health care, and unemployment, traditional media will prove more effective.

Contact with Government by Type of Internet User

"In the past three months, approximately how often have you had contact with the Government of Canada for information or assistance?"

BY AGE

	18-34 %	35-54 %	55+ %
Contact in the past 3 months	54	49	35
No contact in the past 3 months	46	51	65

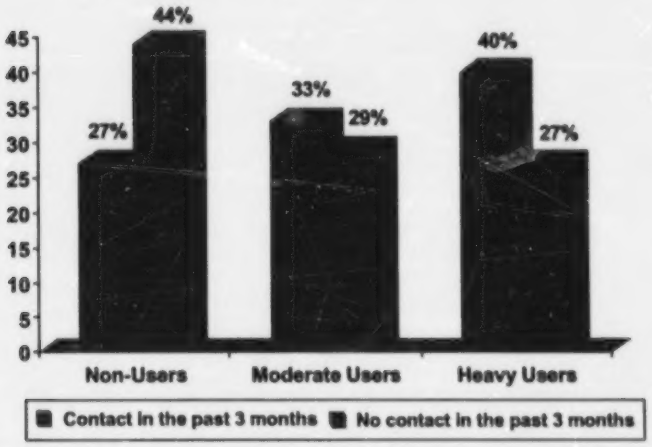
BY INCOME

	<$30,000 %	$30,000 - $59,999 %	>$60,000 %
Contact in the past 3 months	48	45	50
No contact in the pas 3 months	52	55	50

BY EDUCATION

	<High school %	High school %	Postsecondary %	University %
Contact in the past 3 months	35	40	51	54
No contact in the past 3 months	65	60	49	46

Contact with Government by Type of Internet User



- Those who have contacted the Government of Canada in the past three months have tended to be young, well-educated, and have high annual incomes. Heavy and moderate users of the Internet have also contacted the Government more often than non-users, suggesting that the Internet may be a particularly useful tool for Canadians who contact the Government frequently (see preceding page).

Method of Contact

"How did you contact the Government to get this service?"

BY AGE

	18-34 (%)	35-54 (%)	55+ (%)
Telephone	59	63	65
Internet	22	20	8
In-Person	14	15	14
Mail	5	5	10

BY GENDER

	Male (%)	Female (%)
Telephone	56	67
Internet	23	14
In-Person	16	13
Mail	5	7

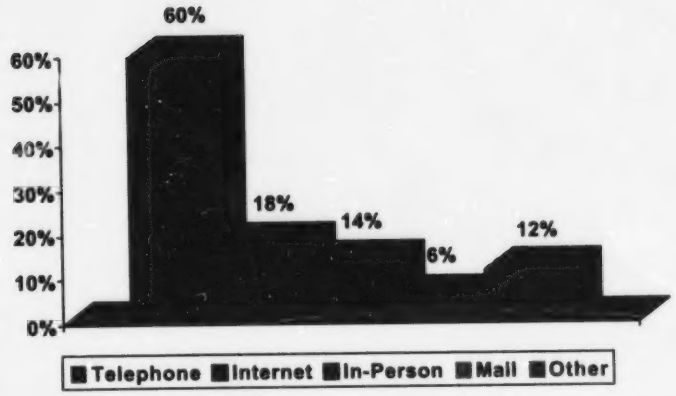
BY INCOME

	<$30,000 (%)	$30,000 - $59,999 (%)	>$60,000 (%)
Telephone	67	64	57
Internet	12	14	28
In-Person	14	17	13
Mail	7	6	5

BY INCOME

	<High school (%)	High school (%)	Post-secondary (%)	University (%)
Telephone	70	66	61	57
Internet	5	9	19	28
In-Person	19	15	14	13
Mail	4	9	7	5

Method of Contact



- The telephone is by far the most common means of contacting the Government, although the Internet is now in second place (at 18%). This is up from 3% in a survey by Ekos Research three years ago (Ekos Research Associates Inc., *The Information Highway*, 1997).
- Women (67%), those with less than a high school education (70%), lower income earners (67%) and older Canadians (65%) were most likely to use the telephone to contact the Government (see preceding page).
- Men (23%), young adults (22%), those with higher incomes (28%) and university-educated (28%) people were most likely to use the Internet to contact the Government. Heavy users of the Internet were twice as likely as moderate users (33% and 16% respectively) to contact the Government via the Internet.

Demographic Profile: Awareness of 1 800 Number

"Would you say you are very aware, somewhat aware, not very aware or not at all aware of the Government of Canada's main toll free number 1 800 O-Canada?"

BY AGE

	18-34 %	35-54 %	55+ %
Aware	28	30	38
Not aware	72	70	61

BY INCOME

	<$30,000 %	$30,000 - $59,999 %	>$60,000 %
Aware	39	32	27
Not aware	61	68	73

BY EDUCATION

	<High school %	High school %	Post-secondary %	University %
Aware	37	33	32	28
Not aware	63	67	68	72

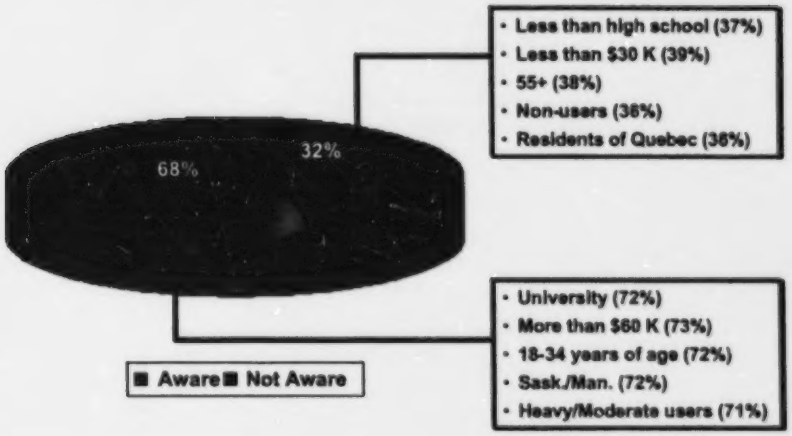
BY REGION

	B.C. %	Alb. %	Sask./Man. %	Ont. %	Que. %	Atl. %
Aware	30	33	28	30	36	32
Not aware	70	67	72	70	64	68

"How did you contact the Government to get this service?"

Of those who used the telephone to contact the Government, 38% were aware of the 1-800 number and 62% were not aware of the 1-800 number.

Demographic Profile: Awareness of 1 800 Number



- Given the heavy use of the telephone to access services, the 1-800 O Canada line should be considered an important communications vehicle as the survey found that one third of Canadians are aware of it.
- There are demographic and regional differences between those who are aware of the 1-800 O Canada line and those who are not aware (see preceding page). For example, those who are most aware of the 1-800 number tend to have less than high school education, have lower incomes, are older, and tend to be non-users of the Internet. Essentially, those who are most likely to use the telephone to contact the Government of Canada are also the most likely to be aware of the 1-800 number. Quebecers also tend to be more aware of the 1-800 number, partially because they are the province most likely to use the telephone when contacting the Government of Canada (70%) and also perhaps because of an initiative to provide information on the Government of Canada that took place in early 2000. This initiative focussed on raising awareness of the 1-800 number and the central web site.
- Interestingly, of those who did use the telephone to contact the Government for assistance or service, 62% indicated they were unaware of the 1-800 O Canada line, suggesting a need to continue raising awareness of this toll-free phone line.

Type of Information Sought

"In your most recent contact, what type of information or assistance were you looking for?"

BY AGE

	18-34 %	35-54 %	55+ %
Taxes/customs	23	28	28
Social programs	13	14	27
Employment-related	11	12	6
Health-related	8	6	7
Education-related	11	4	–

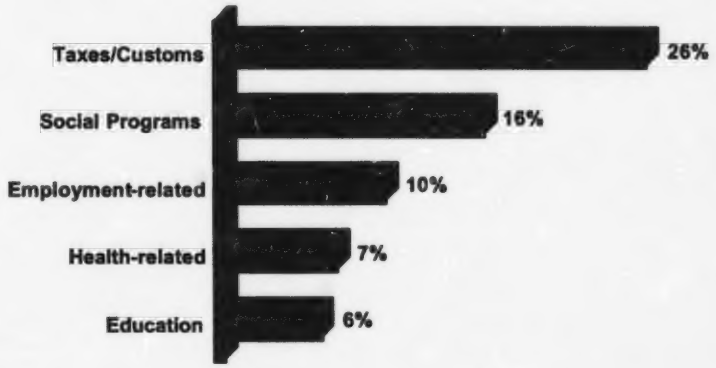
BY INCOME

	<$30,000 %	$30,000 - $59,999 %	>$60,000 %
Taxes/customs	19	26	30
Social programs	26	16	11
Employment-related	13	11	8
Health-related	9	7	6
Education-related	8	6	5

BY REGION

	B.C. %	Alb. %	Sask./Man. %	Ont. %	Que. %	Atl. %
Taxes/customs	26	34	26	24	26	25
Social programs	18	13	18	12	22	21
Employment-related	6	12	11	10	11	14
Health-related	6	8	4	9	4	5
Education-related	7	6	7	7	3	8

Type of Information Sought



- Of the 46% of respondents who contacted the Government during the past three months, approximately one-quarter of these were looking for information or assistance on taxes or customs. Information on social programs such as pensions or EI, employment-related issues, health-related issues and education-related issues were also mentioned frequently by those who contacted the Government.
- Those earning more than $60,000 per year were most likely to be interested in information on taxes (30%), while older Canadians tended to ask for information on taxes and pensions.
- Employment-related information was most popular amongst those earning less than $30,000, as well as those between 18-54 years of age. Information on education-related matters was more of an issue for younger Canadians (11%).

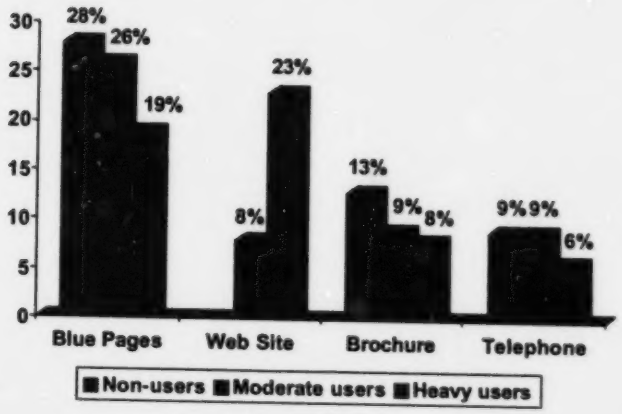
Source of Information

"How did you find out how to contact the Government to get this service?"

BY REGION

	B.C. %	Alb. %	Sask./Man. %	Ont. %	Que. %	Atl. %
Blue Pages	26	27	22	23	22	27
Web Site	10	8	7	14	13	6
Brochure	8	8	11	7	14	8
Telephone	10	7	9	7	6	9

Source of Information



- The Blue Pages are the main source to which Canadians turn when trying to determine how to contact the Government, regardless of the type of information being sought (e.g. taxes, social programs or employment-related). Nearly one-quarter of respondents indicated they had used the Blue Pages, followed by 12% who used a Web site. Use of Web sites is highest in Ontario (14%) and lowest in Manitoba/Saskatchewan (7%) and the Atlantic Region (6%) (see preceding page).
- Heavy Internet users (23%) are the most likely to use a Web site when determining how to get a particular service from the Government.

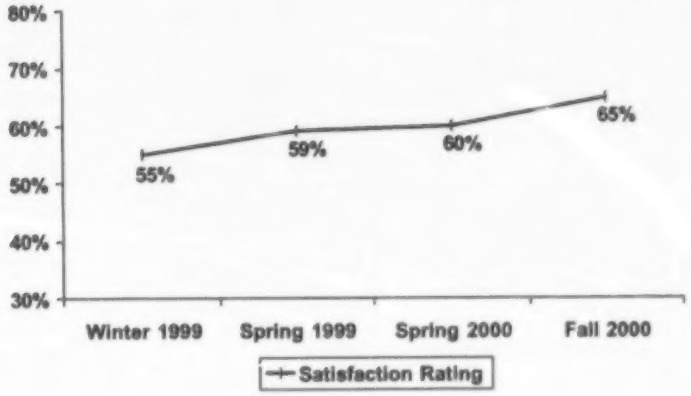
Overall Service Rating

"How do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor."

BY REGION

	% satisfied with service
B.C.	63
Alb.	65
Sask./Man.	65
Ont.	63
Que.	69
Atl.	68

Overall Service Rating



- Overall, Canadians rated the quality of the service or information they received very positively. In the Fall 2000 survey, fully 65% rated the service as good or excellent -- up from 55% 18 months ago (CIO, Winter 1999). This increase may have been partially driven by an increase in client satisfaction with Internet services, which rose from 62% in the Spring (2000) to 80% in the Fall (2000). Satisfaction with service or information received is also consistently high across the country (see preceding page).

Positive Service Rating by Method of Contact

"How did you contact the Government to get this service?"

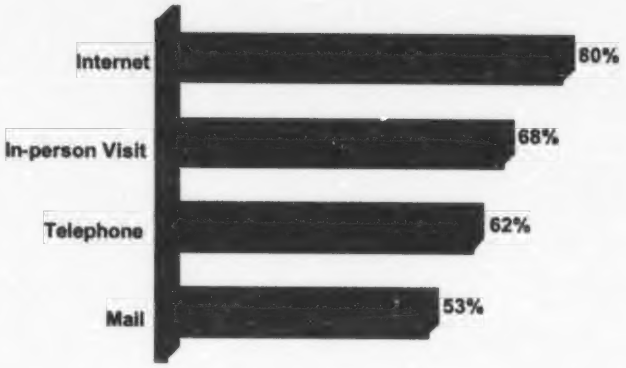
"How do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor."

	Positive Service Rating %	Negative Service Rating %
Telephone	62	23
Internet	80	9
In-Person	68	20
Mail	53	22

FREQUENCY OF CONTACT BY TELEPHONE

	1-3 Times %	4 or More Times %
Positive service rating	64	55
Negative service rating	20	34

Positive Service Rating by Method of Contact



- Positive ratings for service or information received varied strongly depending on how respondents contacted the Government. The highest level of satisfaction was found among persons who contacted the Government via the Internet (see preceding page). High satisfaction with service received through the Internet was high among all demographic groups and among heavy and moderate users of government services. This level of satisfaction is likely to be related to the inherent timeliness of the information received via the Internet.
- Overall, 53% of Canadians who used the mail were satisfied with the service or information. Of those who used mail, older Canadians (58%) and those with less than high school (63%) tended to be most satisfied with the service or information obtained. Alternatively, those with a university education were the least satisfied (45%).
- Frequency of contact also appears to be related to satisfaction with service or information obtained via the telephone. Fully one in three respondents who contacted the Government by telephone frequently (on 4 or more occasions in the past 3 months) rated the service or information as poor, compared to 20% who had contacted the Government on three occasions or less.

Impact of Service on Government Performance

"And how do you rate the overall quality of the information or service you received? Please use a 7-point scale where 1 means very poor and 7 means very good and 4 means neither good nor poor."

RESPONSE BY EDUCATIONAL ATTAINMENT

Educational Attainment	Good (5,6,7) %	Neither (4) %	Poor (1,2,3) %
Less than HS	56	23	22
HS Completed	66	14	20
Other Post-secondary	65	15	20
University	67	15	17
Canada	65	15	19

Crosstabulation of the Government's Rating on Service with the Overall Performance Rating

"Generally speaking, how would you rate the performance of the Government of Canada? Please use a 7-point scale where 1 is terrible, 7 is excellent, and the mid-point is neither good nor bad."

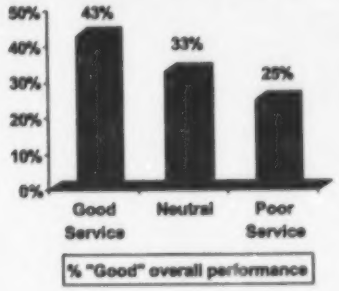
"And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor."

Overall Performance	Good (5,6,7) %	Neither (4) %	Poor (1,2,3) %
Good	56	23	22
Neither	66	14	20
Poor	65	15	20

Impact of Service on Government Performance

Rating of Service Received

Proportion Who Gave Government "Good" Overall Performance Rating: by Level of Service Received



- The public gave the Government very positive ratings for providing service or information. Two out of three Canadians who contacted the Government during the three months previous to the survey gave a good rating to the service or information received.
- There is also evidence of a relationship between receiving good service or information from the Government and a positive rating of the Government's overall performance. Among those Canadians who had a positive experience (with respect to service or information) in the previous three months, 43% gave the Government a good overall performance rating. On the other hand, among those who had a negative experience, only 25% of respondents rated the Government's performance positively. Finally, among those who were ambivalent about their experience (neither positive nor negative), 33% gave the Government a good rating (see preceding page).

Factors Affecting Service Ratings - POR Results

- Professional service
- Access
- Quality service
- Quick service
- Uncomplicated service

The results of 25 public opinion research studies on client satisfaction with Government services were analyzed to determine what factors impact how people rate the service they receive from the Government of Canada. Five main factors emerged from this meta-analysis:

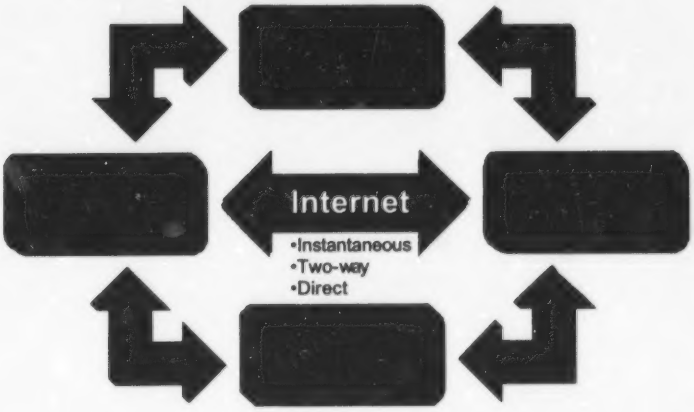
1. Professional service, including people who are friendly, helpful, professional, courteous, knowledgeable, empathetic, fair and understanding;
2. Accessing services, including knowing where to go to get a particular service (e.g. location, phone number) and actually getting the service (e.g. getting through on the phone and finding the right person);
3. Quality service, which includes clear messages about the service and what it does, meeting or exceeding client expectations, producing reliable information, easy access to the information, delivering information on request, being transparent and open;
4. Quick service (respondents mentioned timeliness, promptness, quick turnaround time and the speed with which the information is delivered as factors which influence how they rate the service they receive); and finally,
5. Simplified service, which includes simple, uncomplicated processes (as little "red tape" as possible), using common language and everyday examples - especially in brochures; and consulting with users.

Conclusions

- Communications Strengths: Managing the economy, the environment and unemployment
- Communications Challenges: health, taxes, cost-effectiveness
- Service Ratings Positive
- Growing Role of Internet

- In conclusion, managing the economy was the Government's most important communications strength. However, health remains the top priority for Canadians and its major communications challenge. Other challenges include education and the financial management of programs. Another layer of public priorities also merits attention: crime and justice, taxation, unemployment and the environment.
- The Government gets good ratings for its delivery of information and assistance to the public. The role of the Internet continues to grow. A considerable number of Canadians now consider the Internet to be their primary tool for communicating with Government and accessing services.

E-Communications: The New Relationship between Government and Citizens



- The growth of the Internet has already affected the relationship between Government and citizens in many ways.
- There is strong evidence that Canadians who contact the Government through Internet for information or assistance are more satisfied with the service received than those who have used traditional methods.
- Among the Canadians who have begun using the Internet, Government web sites also have had a positive impact.
- The rise of this new medium, which is direct, instant and two-way, provides an opportunity to improve and speed the flow of communications between Government and citizens.
- However, although the diffusion of the Internet throughout our society has been rapid, it has been uneven. Older Canadians and persons with less formal education and lower incomes are less likely to use Internet and to adopt it in the near future.